

**INDUSTRIAL ELEMENT**

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## Industrial

Manufacturing activities which employ a significant amount of the City's work force represent an important economic contribution both to the City and region. A larger percentage of the work force however, is engaged in non-manufacturing industries and a variety of activities that are supportive of manufacturing. These industries include wholesaling, warehousing, industrially related offices and parking, auto wrecking, junk, and other outdoor storage yards.

The location of industrial sites must be closely coordinated with the development of housing to obtain efficiency in land use patterns and with the transportation system to serve the specific needs of the industrial facility and for the employed worker.

## FINDINGS

### The Industrial Inventory

The inventory of industrial lands for the City was updated in November 1977 and again in May 1978. The results of the inventory are depicted in Table 16. The net area designated for industrial development in the City is 9,463 acres. Of that about 2,860 acres are occupied by industrial uses, 1,718 acres by non-industrial uses, and the remaining 4,885 vacant acres are either zoned or designated in community planning areas for industrial use.

### Analysis of Vacant Areas by Size

An analysis of the inventory by size of vacant industrially designated areas provided the following data:

Ten Largest Vacant Areas	Vacant Industrial Zoned	Other Vacant	Total Vacant
Mira Mesa West	0	900	900
Otay Mesa East	0	900	900
Kearny Mesa-Murphy Canyon - City Research Park	584	134	718
Mira Mesa	240	334	574
Bernardo Industrial Park	169	192	361
Sorrento Valley	262	---	262
University East	5	194	199
Scripps Ranch	132	15	147
North City West	---	103	103
International Industrial Park	20	82	102
	1,412 ac.	2,854 ac.	4,266 ac.

The 4,266 acres contained in these ten areas represent 87 percent of the total vacant acreage available for industrial development in the City. Perhaps even more significant however, the top eight areas contain about 80 percent of the City's vacant land that is industrially zoned. It should be noted that the original inventory conducted in 1968 showed five of the areas as having readily available land in suitable quantities. With the exception of the International Industrial Park and Otay Mesa East, most of the areas containing vacant industrial land are located north of Mission Valley.

An analysis of vacant land based upon a sampling of industrial areas was conducted to determine the extent to which these areas are reasonably available for use. Reasonably available for use was defined as parcels larger than one acre that have existing utilities and access, that are developable within twelve months, and are available at marketable prices. The areas were analyzed to determine their availability for basic sector manufacturing, non-basic industry, or non-industrial uses. The results indicated that approximately two percent of the vacant land in the sample areas is reasonably available for manufacturing and about 15 percent is available for other industrial uses. This analysis indicates a serious shortage of reasonably available industrial parcels in general, and particularly so for manufacturing uses.

### **Analysis of Sites by Size**

An analysis was made of vacant industrially designated parcels of ten acres or larger. This analysis excluded Mira Mesa West, Interstate 15 Corridor, and Otay East because they were not designated industrial areas at the time the study was conducted in November 1977. The following table summarizes that analysis.

VACANT PARCELS OF TEN ACRES OR LARGER IN DESIGNATED INDUSTRIAL AREAS

Status	Parcels	Total Acres
Reasonably available for use.....	28.....	774
Considered for future development.....	20.....	470
Committed for other use and/or development.....	<u>9</u> .....	<u>168</u>
	57	1,412

The above table indicates that a serious shortage of large parcels suitable for industrial development exists in the City.

### **Inappropriately Zoned and Designated Industrial Areas**

Eight areas that were included in the past industrial inventories have been removed from the current inventory. For the most part these are areas that presently have industrial zoning but are being deleted because of present use or because of plan revisions that have taken place or are proposed.

The deletion of these areas results in a more meaningful industrial inventory and thereby provides a more accurate reflection of existing and potential industrial land within San Diego.

TABLE 16  
Inventory Of Designated Industrial Areas

Oct.-Nov. 1977  
(Figures in Acres)

Designated Industrial Areas	Gross Area*	Exclusions (a)	Net Area	Industrial Use (b)	Other Uses (c)	Vacant Industrial Zoned	Other Vacant	Total Vacant
1. Bernardo Ind. Park	625	70	555	185	9	169	192	361
2. North City West	124	10	114	0	11	0	103	103
3. Sorrento Valley	589	40	659	215	72	262	0	262
4. Torrey Pines North	193	97	96	17	2	31	46	77
5. Torrey Pines Science Park	88	19	69	21	0	48	0	48
6. Torrey Pines West	36	0	36	6	17	13	0	13
7. Torrey Pines East	355	181	174	174	0	0	0	0
8. Campus Point	183	127	56	0	0	2	54	56
9. University East	352	126	266	27	0	5	194	199
10. Mira Mesa	1,118	223	895	267	54	240	334	574
11. Scripps Ranch	196	7	189	24	18	132	15	147
12. I-805 and Governor	84	40	44	0	0	0	44	44
13. Rose Canyon	187	24	163	60	35	64	4	68
14. Kearny Mesa West (d)	1,387	25 (d)	1,362	357	(d) 759	122	124	246
15. Kearny Mesa East	1,167	40	1,127	632	162	324	9	333
16. Murphy Canyon	301	123	178	68	19	91	0	91
17. City Research Park	96	9	87	29	10	47	1	48
18. Murphy Canyon South	16	2	14	14	0	0	0	0
19. Grantville North	87	6	81	39	8	17	17	34
20. Morena Blvd	154	16	138	61	61	8	8	16
21. Hwy. 163 and Friars	11	2	9	7	0	2	0	2
22. Mission Valley East	59	17	42	0	33	0	9	9
23. Grantville	161	1	160	62	69	26	3	8
24. Hancock and Sherman	50	2	48	21	19	8	0	8
25. Pacific Highway	149	16	133	34	97	2	0	2
26. Wabash and Hwy 94	13	1	12	4	1	1	6	7
27. Home and Federal	16	1	15	5	6	3	1	4
28. 43 <sup>rd</sup> and Federal	25	0	25	15	10	0	0	0
29. 60 <sup>th</sup> and Federal	8	0	8	3	3	0	2	2
30. Commercial Avenue	41	1	40	14	21	5	0	5
31. The Dells Ind. Park	40	0	40	19	16	3	2	5
32. 41 <sup>st</sup> and Market	17	0	17	0	0	17	0	17
33. Euclid and Market	79	4	75	42	18	12	3	15
34. Harbor-Hwy. 101	111	37	74	58	12	4	0	4
35. Wabash and Newton	6	0	6	3	1	2	0	2
36. Dalbergia St.	37	0	37	16	14	7	0	7
37. Hollister and Palm	29	15	14	3	11	0	0	0
38. Beyer and Iris	55	0	55	0	11	44	0	44
39. Brown Field (e)	200	102	98	0	98	0	0	0
40. Int'l Industrial Park	105	0	105	0	3	20	82	102
41. Western Mira Mesa	900	0	900	0	0	0	900	900
42. Otay Mesa East (t)	900	0	900	0	0	0	900	900
43. I-15 Corridor	100	0	100	0	0	0	100	100
Sub Totals	10,450	1,384	9,066	2,502	1,680	1,731	3,153	4,884
44. Tide Lands (City Only)	402	5	397	358	38	0	1	1
Totals	10,852	1,389	9,463	2,860	1,718	1,731	3,154	4,885

\* Does not include areas that are used or proposed for streets and highways.

(a) Exclusions include: slopes in excess of 25%, existing or proposed flood channels, utility easements, open space, and railroad right-of-way.

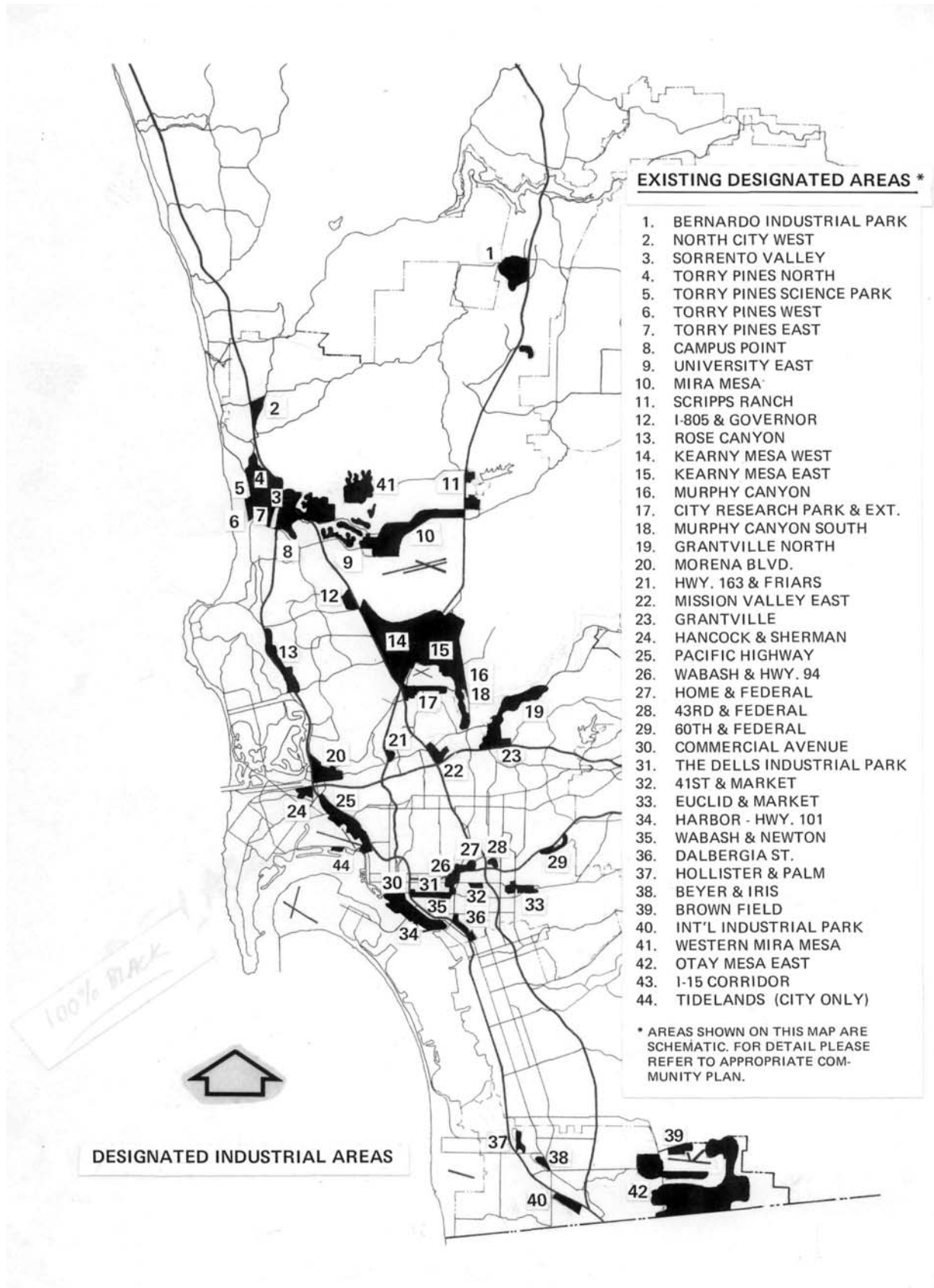
(b) Industrial uses include: manufacturing, wholesaling, warehousing, industrially related offices and parking, auto wrecking, junk, and other outdoor storage yards.

(c) Other uses include: residential, commercial extractive, public and semi-public, parking not industrially related, utilities, and military.

(d) Includes 374.42 acres of Miramar Naval Air Station located south of proposed Highway 72.

(e) This area is unzoned and currently a part of the airport northwest of the runway. Area was once considered for an industrial park.

(f) 2300 acres of designated industrial land in the proposed Otay Mesa annexation are not counted in this inventory.



**EXISTING DESIGNATED AREAS \***

1. BERNARDO INDUSTRIAL PARK
2. NORTH CITY WEST
3. SORRENTO VALLEY
4. TORRY PINES NORTH
5. TORRY PINES SCIENCE PARK
6. TORRY PINES WEST
7. TORRY PINES EAST
8. CAMPUS POINT
9. UNIVERSITY EAST
10. MIRA MESA
11. SCRIPPS RANCH
12. I-805 & GOVERNOR
13. ROSE CANYON
14. KEARNY MESA WEST
15. KEARNY MESA EAST
16. MURPHY CANYON
17. CITY RESEARCH PARK & EXT.
18. MURPHY CANYON SOUTH
19. GRANTVILLE NORTH
20. MORENA BLVD.
21. HWY. 163 & FRIARS
22. MISSION VALLEY EAST
23. GRANTVILLE
24. HANCOCK & SHERMAN
25. PACIFIC HIGHWAY
26. WABASH & HWY. 94
27. HOME & FEDERAL
28. 43RD & FEDERAL
29. 60TH & FEDERAL
30. COMMERCIAL AVENUE
31. THE DELLS INDUSTRIAL PARK
32. 41ST & MARKET
33. EUCLID & MARKET
34. HARBOR - HWY. 101
35. WABASH & NEWTON
36. DALBERGIA ST.
37. HOLLISTER & PALM
38. BEYER & IRIS
39. BROWN FIELD
40. INT'L INDUSTRIAL PARK
41. WESTERN MIRA MESA
42. OTAY MESA EAST
43. I-15 CORRIDOR
44. TIDELANDS (CITY ONLY)

\* AREAS SHOWN ON THIS MAP ARE SCHEMATIC. FOR DETAIL PLEASE REFER TO APPROPRIATE COMMUNITY PLAN.

DESIGNATED INDUSTRIAL AREAS

## **Planning for the Future**

The process of determining the amount of land that should be allocated for industrial use is difficult. Enough acreage should be designated to meet anticipated needs and to provide enough acreage for choice so that market forces can operate and maintain land prices within reasonable limits. On the other hand, too much industrial acreage can preclude the timely development of close-in properties and even result in the premature escalation of property taxes. An overabundance of industrial land may also contribute to a diffused, inefficient, and uneconomical industrial development pattern.

## **The Industrial/Residential Locational Pattern**

A pattern is emerging locally, similar to one observable throughout the nation, which finds industry moving to the suburbs while the blue collar work force remains in the older residential sections closer to the central part of the metropolitan area. These blue collar workers are least financially able to afford private automobile transportation to a place of work, while the suburbanites living near the new outlying factories often commute daily to their jobs in downtown business districts.

This condition has prevailed in spite of attempts to effectuate Council Policies relating to the timing and location of residential, commercial, and industrial development and in the fostering of balanced community development in San Diego.

## **Incompatibility of Uses Within Industrial Zones**

Major portions of the City's industrially zoned lands have been preempted by commercial and other non-industrial uses. This has often excluded manufacturers and other large employers from using these areas. Perhaps even more important however, the preemption of industrial by non-industrial users has commonly caused land prices and property taxes to escalate beyond levels feasible for manufacturing use. The following factors, whether singly or in combination, appear to be responsible:

- permissive industrial zones that allow a range of non-industrial uses;
- inability of industrial users, especially manufacturers, to compete in the land market with non-industrial users;
- tax pressures on landowners;

## **Obsolescence and Deterioration of Older areas**

Several of the City's older industrial areas suffer from a variety of problems. Perhaps heading this list is the process which results in the obsolescence and deterioration of industrial facilities. Some of the more powerful forces contributing to the obsolescence and deterioration of industrial areas are age, mixed uses (especially non-industrial uses), traffic congestion, inadequate parking, small lots and inefficient subdivision patterns, and changing technologies

and methods of operation. A number of the same forces that result in obsolescence and deterioration can also cause property values to fall. This in turn tends to worsen deterioration and the process becomes self-perpetuating. Perhaps the overall effects of this process on surrounding neighborhoods and communities in general are even more significant than they are in the industrial areas themselves.

It should be noted that some older industrial areas serve as locations for industries that are marginal or in incubator stages. Without these areas it is possible that many of these users would be denied the chance to survive, and in some instances, to expand into stable and productive establishments.

**Matching Skills of the Labor Force with Industrial Activities**

At the time General Plan studies were undertaken in 1977 San Diego had a serious unemployment problem (9.3 percent seasonally adjusted) compared with the statewide average (7.2 percent) and the national average (6.9 percent). Fortunately, however, the quality of the labor force is one of this area's assets. San Diego's unemployed appear to be adaptable to a wide range of job activities.

According to a sample survey of the unemployed derived from occupational statistics of workers receiving unemployment insurance, the job skills of San Diego's unemployed presently break down as follows:

Crafts, operatives, and transport.....	32%
Clerical and sales.....	20%
Professional technical & management administrative.....	15%
Services .....	13%
Other.....	20%
	100%

For that segment of the unemployed made up of very young first time job seekers, immigrants from around the country etc., who lack specific job skills, there are available educational opportunities through the public school system, vocational training both public and private, and the continuing public employment and employee training projects of the Regional Employment Training Consortium.

**The Importance of Manufacturing to the Local Economy**

In 1977 San Diego's economy was in a cycle that emphasized reliance on government, tourism, and the provision of services. At that time manufacturing activities employed about 15 percent of the work force compared with the statewide average of 22 percent and the national average of 24 percent. This is contrasted with the aerospace cycle of the 1960s when San Diego had about

26 percent of its labor force employed in manufacturing. This information indicates that the manufacturing sector of our economy needs strengthening.

Manufacturing industries are desirable because they result in the importation of money from outside the area which gives stability to our local economy. Manufacturing industries also result in the creation of more secondary or support industries than is the case with non-manufacturing activities.

Because San Diego's economy now relies heavily on tourism and government as sources of employment it is not likely in the future that manufacturing will employ a proportion of the labor force quite equal to that of the state or national average.

As stated earlier, there is a shortage of reasonably available land for manufacturing in the City. One of the reasons for this shortage is the heavy absorption of industrially zoned land by non-industrial and non-manufacturing activities which commonly utilize industrially zoned land. As a result of the current demand for industrially zoned land by these non-manufacturing activities, and by the development industry responding to the needs of these non-manufacturing uses, manufacturers contemplating expansion or relocation in the San Diego area find few attractive parcels that are located in proximity to transportation and population centers and are available at costs competitive with other metropolitan areas.

### **The Use of Publicly Owned Lands for Industry**

Various public agencies including the City, county, state, and federal governments hold significant amounts of undeveloped land in the City. Periodically these agencies dispose of portions of their lands that have been declared surplus. City policy with respect to the acquisition of such areas has been inconsistent. There is a possibility that if a published inventory of such lands existed, some might be readily identified for industrial use.

### **GOALS**

- ENSURE THAT INDUSTRIAL LAND NEEDS AS REQUIRED FOR A BALANCED ECONOMY AND BALANCED LAND USE ARE MET CONSISTENT WITH ENVIRONMENTAL CONSIDERATIONS.
- PROTECT A RESERVE OF MANUFACTURING LANDS FROM ENCROACHMENT BY NON-MANUFACTURING USES.
- REVITALIZE THROUGH PUBLIC AND PRIVATE EFFORTS, INDUSTRIAL AREAS WHICH ARE BASICALLY WELL LOCATED BUT SHOW ENVIRONMENTAL AND/OR FUNCTIONAL DEFICIENCIES.
- ENCOURAGE THE INDUSTRIAL DEVELOPMENT IN THE SOUTHERLY HALF OF THE CITY TO MAKE IT AS ATTRACTIVE TO INDUSTRIAL USERS AS THOSE AREAS NORTH OF MISSION VALLEY.



- DEVELOP AND MAINTAIN PROCEDURES TO ALLOW EMPLOYMENT GROWTH IN THE MANUFACTURING SECTOR AT OR NEAR THE STATE AVERAGE.

## **GUIDELINES AND STANDARDS**

### **Site Characteristics**

Land proposed for industrial use should have sufficient gradient to permit drainage but should not be too steep to preclude the development of sites of 10 acres or larger at the same elevation.

It is important to recognize that industrial land has two distinct classifications: (1) areas for manufacturing, scientific and corporate headquarters; and (2) areas for servicing, warehousing and wholesaling. Each of these classifications has differing requirements related to accessibility to potential employees. The first classification requires a relatively high number of employees per square foot and so should be located conveniently to the labor pool, if possible. The second classification does not require a high number of employees per square foot and is more dependent on access to transportation routes.

## **RECOMMENDATIONS**

As mentioned earlier, in allocating additional land for industrial use it is imperative that sufficient acreage be designated to meet projected needs so that the existing market can operate effectively. At the same time, for reasons that have already been stated, it is important not to provide an overabundance of industrial land.

Based on an analysis of vacant industrially designated land, it was concluded that less than 20 percent of the vacant industrial land is reasonably available for use. This shortage is even more serious with land suitable for manufacturing activities.

In response to the problem of inadequate supply, two large industrial areas are being added to the industrial inventory. These areas include approximately 900 acres in the area impacted by Miramar Naval Air Station and about 3,200 acres in Otay Mesa East. Otay Mesa East lies mostly outside the City but is being planned jointly by the county (2300 acres) and the City (900 acres). The acreage in each of these areas may be expanded when the community plans are finalized and adopted. A minimum of 25 percent of the designated acreage should be reserved for the exclusive use of scientific, manufacturing, and corporate headquarters. In addition to the above two areas, about 100 acres of land are proposed for industrial designation in the Interstate 15 corridor area.

Finally, as part of the community planning process and studies of public and privately owned vacant lands, additional industrial lands will be considered for designation as these plans and studies are systematically undertaken. As a part of this process particular attention will be given to the designation of new industrial areas within the urbanized portions of the City.

- Where physical conditions and ownership situations permit, encourage the designation of additional industrial land with larger site sizes that can accommodate larger basic sector manufacturing activities.
- In designating additional industrial land special attention should be given to any suitable public and privately owned areas in the existing urbanized area, especially between Mission Valley and the National City boundary.
- Make available sufficient industrial land limited to manufacturing in order to attract industrial users who will utilize our unemployed work force.
- The City should act as a catalyst and become an active participant in making more industrial land available.
- Develop a City-sponsored program aimed at land banking future industrial lands for manufacturing purposes.
- Wherever practical restrict the use of city-owned industrially zoned lands to manufacturing or headquarters firms that indicate potential for developing base sector economic employment.
- Create an industrial zone specifically designed to accommodate manufacturing uses.
- Evaluate and consider for removal all inappropriately zoned and/or designated industrial lands from the industrial inventory.
- Support efforts of the Chamber of Commerce and the Economic Development Corporation to attract manufacturing firms to the City.
- Undertake specific redevelopment programs in older industrial areas in order to upgrade their utility and function as industrial districts.
- Develop incentives aimed at encouraging the development of industrial land that is zoned and has a full range of community services and facilities.
- Conditionally reduce parking requirements for industrial establishments who provide transportation for their employees.